Trends in Georgia Agriculture and Natural Resources

Presented by: John C. McKissick

The Center for Agribusiness and Economic Development

College of Agricultural and Environmental Sciences

The University of Georgia
2008 Total Farm Gate Value
GA = $11.9 billion
2007 = $11.6 billion

Livestock & Aquaculture 10.6%
Vegetables 7.1%
Ornamental Horticulture 5.8%
Other Income 5.1%
Forestry & Products 4.8%
Fruits & Nuts 2.2%
Poultry & Eggs 47.4%
Row & Forage Crops 16.9%
2008 Grower Farm Gate Value
(Total Farm Gate Value minus broiler-integrator)
GA = $7.5 billion
2007 = $7.4 billion

2008 Georgia Grower Value
Top 10 Commodities

- **Beef**: 5.5%
- **Broilers**: 6.0%
- **Horses**: 4.9%
- **Timber**: 6.3%
- **Peanuts**: 7.8%
- **Dairy**: 4.1%
- **Greenhouse**: 3.5%
- **Corn**: 3.2%
- **Eggs**: 7.9%
- **Rest of commodities**: 43.0%

**2008 Georgia Grower Value**

- **Total Farm Gate Value minus broiler-integrator**
- **GA = $7.5 billion**
- **2007 = $7.4 billion**
Number of Georgia Farms by Commodity

- Beef cows: 17,721
- Forage: 14,556
- Orchards: 3,745
- Corn/grain: 3,114
- Layers: 2,870
- Peanuts/nuts: 2,762
- Cotton: 2,577
- Broilers/meat type: 2,665
- Soybeans/beans: 1,617
- Veg harv/sale: 1,445
- Wheat/grain: 1,332
- Hogs/pigs inv: 1,111
- Milk cows: 639
- Oats/grain: 476
- Sorghum/grain: 428
- Corn/silage: 284
- Tobacco: 224

Primary data sources: 1987 & 2007 U. S. Censuses of Agriculture
Livestock & Aquaculture: 10.6%
Vegetables: 7.1%
Ornamental Horticulture: 5.8%
Other Income: 5.1%
Forestry & Products: 4.8%
Fruits & Nuts: 2.2%
Row & Forage Crops: 22.0%
Fruits & Nuts: 2.1%
Ornamental Horticulture: 4.3%
Forestry & Products: 17.9%
Vegetables: 6.2%
Other Income: 6.0%
Livestock & Aquaculture: 11.7%
Fruits & Nuts: 2.1%
Ornamental Horticulture: 4.3%
Forestry & Products: 17.9%
Vegetables: 6.2%
Other Income: 6.0%
Livestock & Aquaculture: 11.7%

Farm Gate Value Comparisons: 1992-2008

1992
- Poultry & Eggs: 29.8%
- Row & Forage Crops: 22.0%
- Livestock & Aquaculture: 11.7%
- Forestry & Products: 17.9%
- Vegetables: 6.2%
- Other Income: 6.0%
- Ornamental Horticulture: 4.3%
- Fruits & Nuts: 2.1%

2008
- Poultry & Eggs: 47.4%
- Row & Forage Crops: 16.9%
- Livestock & Aquaculture: 10.6%
- Forestry & Products: 4.8%
- Vegetables: 7.1%
- Other Income: 5.1%
- Ornamental Horticulture: 5.8%
- Fruits & Nuts: 2.2%

Farm Gate Value
1992 = $6.4 billion
2008 = $11.9 billion
Total Market Value of AG Products Sold
Percentage by Commodity Group

GEORGIA

1987
- Crops: 35.7%
- Poultry: 42.7%
- Other Livestock: 21.6%

2007
- Crops: 30.1%
- Poultry: 59.7%
- Other Livestock: 10.2%

Total Sales
- 1987 = $2.8 Billion
- 2007 = $7.1 Billion

% change in total sales = 153%

Primary data sources: 1987 & 2007 U. S. Censuses of Agriculture
Farm Gate Value
Top Ten Commodities
Comparisons: 1992-2008

1992
- Broilers 24.0%
- Rest of Commodities 21.8%
- Misc. Poultry 3.0%
- Corn 3.1%
- Pork 3.3%
- Dairy 3.7%
- Cotton 4.4%
- Beef 4.6%
- Forestry 17.9%
- Peanuts 8.8%
- Vegetables 5.4%

2008
- Broilers 41.0%
- Rest of commodities 27.0%
- Eggs 5.0%
- Corn 4.9%
- Cotton 4.9%
- Peanuts 2.2%
- Greenhouse 2.2%
- Dairy 2.6%
- Beef 3.1%
- Horses 4.0%
- Timber 4.0%

Farm Gate Value
1992 = $6.4 billion
2008 = $11.9 billion
## Georgia’s Agribusiness Sector
### Economic Impact by Industry Subsector

<table>
<thead>
<tr>
<th>Industry Subsector</th>
<th># of Firms (2008)</th>
<th># of Employees, 2006</th>
<th>Output (in $ M), 2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food and Fiber Production</td>
<td>48,338</td>
<td>89,685</td>
<td>$9,826</td>
</tr>
<tr>
<td>Landscape Services</td>
<td>3,019</td>
<td>37,283</td>
<td>$2,029</td>
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<tr>
<td>Food Processing &amp; Manufacturing</td>
<td>1,613</td>
<td>72,245</td>
<td>$28,374</td>
</tr>
<tr>
<td>(from lists of Federal and State Inspections)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fiber and Other First-line Processing and Manufacturing</td>
<td>1,006</td>
<td>68,089</td>
<td>$21,542</td>
</tr>
<tr>
<td>Farm Input and Machinery Manufacturing</td>
<td>299</td>
<td>5,923</td>
<td>$3,191</td>
</tr>
<tr>
<td>Ag. Wholesale &amp; Retail Trade and Food Distribution (not including any estimate of Food Services and Drinking Places)</td>
<td>8,575</td>
<td>120,818</td>
<td>$11,338</td>
</tr>
<tr>
<td>Total - Direct Agribusiness</td>
<td>62,850</td>
<td>394,043</td>
<td>76,300</td>
</tr>
</tbody>
</table>

Total Agribusiness Output (farm production, first line processing, and distribution) = 10.7% of total State economy
## 2007 Georgia
Production Agriculture + Directly Related Industries
Employment *IMPACT*

<table>
<thead>
<tr>
<th>Industry</th>
<th>Direct</th>
<th>Indirect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture + Direct</td>
<td>213,151</td>
<td>0</td>
</tr>
<tr>
<td>Mining</td>
<td>0</td>
<td>56</td>
</tr>
<tr>
<td>Construction</td>
<td>0</td>
<td>3,796</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>0</td>
<td>6,792</td>
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<tr>
<td>Trans-Utilities-Info</td>
<td>0</td>
<td>17,214</td>
</tr>
<tr>
<td>Trade</td>
<td>0</td>
<td>30,132</td>
</tr>
<tr>
<td>Finance-Ins-Real Est</td>
<td>0</td>
<td>15,206</td>
</tr>
<tr>
<td>Services</td>
<td>0</td>
<td>78,119</td>
</tr>
<tr>
<td>Government</td>
<td>0</td>
<td>1,319</td>
</tr>
</tbody>
</table>

**Total Impact of AG + Directly Related Employment = 365,784 Jobs**

*6.8% of total employment*
2008 Row & Forage Crops Farm Gate Value
GA = $2.0 billion
2007 = $1.7 billion

- Corn: 11.8%
- Cotton: 29.1%
- Peanuts: 29.0%
- Soybeans: 5.8%
- Straw: 2.2%
- Tobacco: 3.5%
- Wheat: 6.1%
- Rye: 1.2%
- Silage: 2.2%
- Barley: 0.0%
- Oats: 0.5%
- Hay: 7.2%
- Other: 0.9%

$0 - $1,000,000
$1,000,000 - $5,000,000
$5,000,000 - $15,000,000
$15,000,000 - $30,000,000
$30,000,000 - $83,298,000
2008 Fruits & Nuts Farm Gate Value
GA = $267.7 million
2007 = $242 million

Strawberries 1.8%
Peaches 18.3%
Apples 2.2%
Blackberries 2.8%
Other 1.2%
Blueberries 22.8%
Grapes 3.9%
Pecans 47.0%
Peaches 18.3%
2008 Vegetables Farm Gate Value
GA = $849 million
2007 = $895 million

Tomato 6.0%
Watermelon 13.9%
Sweet Corn 12.5%
Zucchini 2.0%
Southern Peas 1.3%
Squash 2.9%
Onions 16.4%
Okra 0.1%
Greens 6.7%
Eggplant 2.0%
Cucumbers 9.5%
Cantaloupe 2.4%
Cabbage 4.2%
Bell Peppers 12.4%
Other Peppers 1.48%
Other Veges 7.8%
2008 Ornamental Horticulture Farm Gate Value
GA = $696 million
2007 = $700 million
2008 Livestock & Aquaculture Farm Gate Value
GA = $1.263 billion
2007 = $1.334 billion

Sheep: 0.1%
Pork-Finish only: 1.8%
Quail: 1.96%
Pork-Feeder pigs: 2.9%
Catfish: 0.6%
Beef Stockers: 4.8%
Dairy: 24.2%
Goats: 1.2%
Honeybees: 1.3%
Beef Cattle Fin Out Co: 1.7%
Beef Cows: 22.6%
Horses-board-train-breed: 24.0%
Horses-raised: 8.8%
Other: 1.6%
Pork-Farrow-finish: 2.5%
Other: 1.6%

$0 - $3,000,000
$3,000,000 - $5,000,000
$5,000,000 - $10,000,000
$10,000,000 - $15,000,000
$15,000,000 - $51,332,000

$0 - $3,000,000
$3,000,000 - $5,000,000
$5,000,000 - $10,000,000
$10,000,000 - $15,000,000
$15,000,000 - $51,332,000
2008 Poultry & Egg Farm Gate Value
GA = $5.65 billion
2007 = $5.43 billion

Breeder
Pullet Unit 2.9%

Broiler-Grower
8.0%

Broiler-Integrator
78.5%

Layers-Table egg
4.1%

Layers-Hatching egg
6.4%

Other
0.1%

Breeder-Pullet Unit
2.9%

$0 - $1,000,000
$1,000,000 - $10,000,000
$10,000,000 - $40,000,000
$40,000,000 - $100,000,000
$100,000,000 - $363,297,000
Although there has been a 77.9% decrease in the number of farms during this time period, the average farm size has grown by 98.3%.
Number of Farms: 2007

Primary data source: 2007 US Census of Agriculture

Graphic by Center for Agribusiness & Economic Development, UGA
Trends in Georgia
Land in Farms & Farms by Size

Land in Farms

<table>
<thead>
<tr>
<th>Year</th>
<th>Acres X 1,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>1945</td>
<td>28,000</td>
</tr>
<tr>
<td>1950</td>
<td>27,500</td>
</tr>
<tr>
<td>1954</td>
<td>27,000</td>
</tr>
<tr>
<td>1959</td>
<td>26,500</td>
</tr>
<tr>
<td>1964</td>
<td>26,000</td>
</tr>
<tr>
<td>1969</td>
<td>25,500</td>
</tr>
<tr>
<td>1974</td>
<td>25,000</td>
</tr>
<tr>
<td>1978</td>
<td>24,500</td>
</tr>
<tr>
<td>1982</td>
<td>24,000</td>
</tr>
<tr>
<td>1987</td>
<td>23,500</td>
</tr>
<tr>
<td>1992</td>
<td>23,000</td>
</tr>
<tr>
<td>1997</td>
<td>22,500</td>
</tr>
<tr>
<td>2002</td>
<td>22,000</td>
</tr>
<tr>
<td>2007</td>
<td>21,500</td>
</tr>
</tbody>
</table>

Percent of Farms by Size

<table>
<thead>
<tr>
<th>Size</th>
<th>1987</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-9 acres</td>
<td>7.2%</td>
<td>6.6%</td>
</tr>
<tr>
<td>10-49 acres</td>
<td>32.0%</td>
<td>34.8%</td>
</tr>
<tr>
<td>50-179 acres</td>
<td>35.8%</td>
<td>35.8%</td>
</tr>
<tr>
<td>180-499 acres</td>
<td>16.1%</td>
<td>20.4%</td>
</tr>
<tr>
<td>500-999 acres</td>
<td>5.5%</td>
<td>7.3%</td>
</tr>
<tr>
<td>1000+ acres</td>
<td>4.3%</td>
<td>4.7%</td>
</tr>
</tbody>
</table>

Source: 1945-2007 (quinquennial) Censuses of Agriculture
% of Land in Cropland & Timberland

- 14 - 64%
- 64 - 75%
- 75 - 83%
- 83 - 92%
- 92 - 99%

GA Avg. Co. = 76%
GA Total = 78%
GA Metro = 68%
GA Nonmetro = 83%

Primary data sources:
U.S. Census of Agriculture, 2007
USDA Forest Service, 2007

Graphic by Center for Agribusiness & Economic Development, UGA
Components of Property Tax Digests: 2008
Total of Counties’ Gross 40% value = $338 Billion**

- Residential: 42.3%
- Ag/Pref/Environ: 24.6%
- Commercial: 20.3%
- Industrial: 6.7%
- Utility: 4.8%
- Motor Vehicle: 6.3%
- Mobile Home: 0.4%
- Timber: 0.1%

Primary data source: GA Dept. of Revenue
** (preliminary GA totals-Fulton digest not verified)

Graphic by Center for Agribusiness & Economic Development, UGA
Georgia’s Economic Vitality Index

1980 US Benchmark

Scores: A=10, B=35, C=76, D=34, F=4, Overall Average=2.00

2006 US Benchmark

Scores: A=7, B=45, C=52, D=46, F=9, Overall Average=1.92

Source: Center for Agribusiness and Economic Development, The University of Georgia
Georgia’s Economic Vitality Index
1980 SE Benchmark
Scores: A=10, B=35, C=76, D=34, F=4, Overall Average=2.00

2006 SE Benchmark
Scores: A=9, B=40, C=53, D=45, F=12, Overall Average=1.85

Source: Center for Agribusiness and Economic Development, The University of Georgia
“Supporting Successful and Sustainable Economic Development through Agricultural Research and Extension”

Center for Agribusiness and Economic Development

www.caed.uga.edu
What is the Center?

- The Center’s mission is to add value to Georgia’s agricultural economy through coordinated Research and Extension programs.
- One of five UGA centers in the College, the only one combining Research and Extension (35% State Funds, 65% Grants & Contracts).
- We consist of faculty and staff located in the College of Agricultural and Environmental Sciences BUT most importantly can access all 700 faculty and extension of the College.
Faculty of the CAED - 7.1 EFT
Faculty (3 & 4), 2 EFT Extension

Dr. Jim Daniels – Food Business Development, Agrisecurity
Dr. Bill Thomas – Cooperative Development Specialist, Agrisecurity
Dr. Kent Wolfe – Agribusiness Economist
Dr. Tommie Shepherd – Agribusiness Economist
Dr. John McKissick – Director
Sharon Kane – Food Business Development Specialist
Dr. George Shumaker – Economist, Biofuels Projects – Statesboro
Dr. Marcia Jones – Agribusiness Workforce Assessment
Faculty/Staff of the CAED

Staff
Karen Smith & Jan Hamala – Administrative Secretaries (Partial)
Sue Boatright – Research Coordinator
1 Part-time Research Coordinator
2 Student Workers
3 Graduate Students
  (3 MS – Ag Econ)
Operating

Special Hard Funded Positions Not Included in Annual Budget
Wes Harris, CEC Bulloch Co.
  (25% CAED) Natural Resource Roundtable Initiative
Duren Bell – Extension Agricultural Entrepreneurship Initiative Coordinator
Our Two Objectives:

- Provide data and analysis on relevant policy issues for public and private decision makers.
- Provide feasibility studies, marketing studies, and/or business planning and services for new, emerging or expanding value-added food and fiber ventures.

Service Examples - MARKET MAKER, Flavor of Georgia Food, Ag Tour Directory

Fact-based leadership and economic development through unbiased research/outreach
This study was developed to assist community leadership with their future planning and decision making.

Center Presentation
#09-01 September 2009

Prepared by:
Dr. John C. McKissick and Susan R. Boatright
Presented by: Dr. John C. McKissick
Center for Agribusiness and Economic Development
College of Agricultural and Environmental Sciences
The University of Georgia • Athens, GA
Georgia Cooperative Extension
706-542-0760 • 706-542-8938
To learn more about your county, click on “Georgia Statistics System” at our website:
www.caed.uga.edu